Fundraising Database Functionality

MORGEN THOMAS LTD

FUNDRAISING CONSULTANCY & PROJECT MANAGEMENT

BRIEFING NOTES

FUNDRAISING DATABASE FUNCTIONALITY

Background & Context

Early in the planning of a fundraising programme, database specifications and protocols for the programme should be agreed and maintained to provide continuity and accuracy of data, as the basis for effective programme management and performance monitoring.

Even the simplest of databases can be invaluable as a tool to maintain records and research on donor suspects, prospects and actual donors; a high standard of accurate inputting and usage will help to ensure that embarrassing errors (such as competing approaches from the same organisation) or costly mistakes are avoided.

KEY ISSUES

Recording and Reporting on Prospect Potential

As fundraising progresses, you will wish to add individuals and institutions to the database who have not as yet given; they will be suspects and prospects. (Suspects are individuals and institutions whom you believe have the means and propensity to support your cause. Prospects are individuals and institutions whom you believe have the means and propensity and – crucially - to whom you have access). In short, these are potential donors that we will actively be researching and cultivating to secure their support.

An important part of this process will be the ability to record their financial potential to give. Measuring the progress of and likely ultimate success of the programme will require more than simply a record of how much has been pledged to date. Metrics will need to ensure you have 3-4 times as many prospects as you require donors, and giving potential of 3-4 times the overall target, once refusal rates and other factors have been considered.

Assigning Tasks to Appeal Volunteers

Peer to peer networking and asking is critical to any major fundraising project. You will be identifying and recruiting volunteer leaders of influence and affluence to network with their personal and professional contacts.

Throughout the course of the programme, these volunteers will be assigned tasks such as telephoning prospects, meeting with them, inviting prospects to site visits, events, etc. Similarly managers, senior executives and Board members will at time have key meetings and tasks.

You will wish to capture all this tasking and be able to track and report on it, for example with daily prompts appearing on the desktop to advise what telephone calls need to be made today, by whom and with what intended outcome. You will also wish to produce regular reports on what activity has taken place between certain dates and what activity is scheduled to take place between certain dates.

Relationship & Network Mapping

You will wish to record and report on the personal and professional links and networks between individuals and organisations: relationships between two individual records, such as husband and wife, and relationships between individuals and institutions, e.g. Mr Smith is the contact at a certain company and is also a personal donor, etc.

You will need to ensure that your database can link records based on the knowledge you amass – your network mapping (e.g. you may wish to establish a connection between two individuals because they belong to the same institution. e.g. Mr Smith is a Deputy Lord Lieutenant and Mr Jones is also a Deputy Lord Lieutenant). You will wish to record and report on the fact that they are linked by both being members of the same institution.

You may also wish to create and report on multiple links between records. E.g. Mr Smith works with Mr Jones, but Mrs Brown was at school with Mr Jones and they both have children who attend the same school.

Capturing this information, your network map, can help you decide who is best placed to 'manage' the relationship and, ultimately, then make the ask.

Ideally, all major programmes will have a CRM (Contact Relationship Management) database which will enable the team to:

- Keep a record of all communications (phone, emails, letters, face to face) between themselves, their network of volunteers and donor prospects, the latter whether private individuals, funding organisations such as Trusts and Foundations or corporate donors.
- Record all gifts and pledges – showing restricted, unrestricted, who is responsible for each donor ask, Gift Aid, donor anonymity, etc.
- Be segmented to ensure accurate and appropriate mailings/communications are sent.
- Show progress of donations against target.
- Produce reports for senior management, volunteer leaders, etc.
- Capture prospect research and show inter-relationships network.
- Be capable of assigning specific tasks to volunteer leaders or management.
- Record and report suspect & prospect potential.
- Able to reconcile gifts, pledges and prospect potential with the campaign Table of Gifts.

For more information email us at
info@morgenthomasfundraising.co.uk or visit www.morgenthomasfundraising.co.uk

MORGEN THOMAS LTD

FUNDRAISING CONSULTANCY & PROJECT MANAGEMENT

ONE VICTORIA SQUARE, BIRMINGHAM, B1 1BD, UK. TELEPHONE: 44 (0)121 632 2500.